Planned Giving tomorrow™

Planned Giving Marketing Ideas for All Fundraisers

Winter 2008
Editor: Viken Mikaelian, VirtualGiving, Inc.

CONTENTS

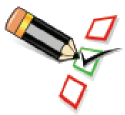
Why a newsletter on planned giving ***marketing***?

Because for each person who asks a question about the Generation Skipping Tax, there are 347 others who ask for the best time to drop a mailing... how to "humanize" their planned giving website... how to choose the most-qualified prospects... why their planned giving newsletters aren't working anymore... whether they should use *spam* to promote planned gifts, etc., etc., etc.

So here it is. You're holding the first marketing newsletter with a planned giving twist. Or is it the other way around?

– Viken Mikaelian

Planned Giving is Not an Important Component of Fundraising



Now that we have your attention – *relax*; 94.2% of your peers disagree with that statement. What else did we find out from our Fall 2007 Survey?

- **More women** in the profession... but only by 1% so far.
- **Highest salary** is in academics, second in healthcare.
- At the end of a hard day, a glass of wine was preferred **two-to-one** over a Martini.

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Barriers to Creating Donor-Centered, Gift Planning Marketing *Brian M. Sagrestano, JD, CFRE*

Over the last several years there has been an increasing movement towards donor-centered philanthropy, with charities seeking to understand the needs of the donor first, and then matching those needs with the goals of the charity.

To put it another way, the role of the charity – in collaboration with the donor's advisors – is to help the donor integrate personal planning and philanthropic goals with tax and financial planning objectives.

Gift planning marketing has been slow to adapt to this change, largely "selling" gift planning vehicles based upon the benefit to the charity and the tax savings to the donor. With ever-increasing demands on gift planning programs to produce current results, and the growing integration of gift planning and major gifts, gift planning marketing efforts need to move to a donor-centered philosophy to help donors find integrated, comprehensive solutions.

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"You Had Me at Bequest!" *Mindy Aleman, CFRE, APR*

The Care and Feeding of Donors

Why not begin the New Year with a fresh, new approach to cultivating and stewarding planned giving donors? Too often, once a prospect has documented his/her bequest intentions, the donor acknowledgment period lasts through several months of standard thank-you letters, a holiday greeting or goodie, and perhaps a recognition dinner, depending on level of gift.

The donor's name is summarily noted in recognition reports, on

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PERSPECTIVE

IRA Rollover: Was it Worth it? *John Foster*

With the perspective of one year, here's the way we see it…

Most donors weren't looking to make outright gifts from their IRAs.

What they wanted to do was roll their accounts over, tax-free, into a charitable life-income plan. They wanted to retain or increase their income, not give it away or reduce the value of their plan.

That is, unless they could afford to make any gift they wanted to. Who is the target market for outright-IRA gifts? They are 71 and older, and their retirement is so securely funded that they feel comfortable giving away some of their annual IRA distribution, or even dipping into the principal to make a charitable gift. To some of these too-good-to-be-true prospects, IRA distributions are just a useless addition to their annual tax bill.

But as our real-life prospects watch the values of their homes decline and their investment portfolio teeter, how many fit the idealized profile described above? Remember, under the

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Planned Giving tomorrow™

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rollover provisions, you've been asking them to make a gift as an act of pure charity – from which they'll receive neither life income nor a charitable deduction. Think about that twice.

Wouldn't IRA donors have made a gift anyway? It would seem so. Yes, the law made a new category of assets available for donation. But most who benefit from it are loyal donors who have a variety of disposable assets to choose from when they make a gift.

Maybe that's why actual gifts received have been modest. Respondents to NCPG's survey reported a total of $104 million of outright-IRA gifts received in approximately 6,000 distributions. That makes for an average distribution of $17,350. Sure, some gifts were larger. But remember, by law, none could be higher than $100,000. And this after all the newsletters and e-mails we sent to prospects promoting this gift opportunity?

Should IRA distributions even be counted as planned gifts? Your organization receives an outright IRA distribution as a cash transfer. No planned gift was involved in delivering it. All you did was inform your prospects about the new opportunity.

A case can be made that IRA distributions are major gifts and not planned gifts. The donor merely substituted a new asset for others that she might have used to make an outright gift. If she had deleted a bequest and made an outright gift in cash, would planned giving have counted that transfer? If not, why count outright IRA gifts?

Many PGOs aren't even counting IRA transfers. The results of our Fall, 2007 survey showed that just 31 percent of respondents counted outright IRA transfers in planned gift totals, while 49 percent counted them as major, outright gifts. A strong minority, 18 percent, did not even pursue IRA gifts.

Maybe that's because they haven't received many. For 83% of respondents, outright transfers from IRA's represented

How To Make Prospects Tune Out Without Trying

John Foster and Vincent Fraumeni

Market constantly and aggressively to your prospects! ... It takes them a long time to make a gift commitment, so stay in their faces! ... If you think planned giving is interesting, they will, too! ... The Internet has revolutionized the whole process of closing planned gifts. ...The Send key is the fundraiser's greatest friend...

Have you been hearing these statements lately at seminars or from website salesmen? Have they tempted you to imagine a brave new world where you will be able to cultivate and close planned gifts by remote control from the comfort of your office? Where prospects will come to you, fascinated by the electronic "spam" you send them daily?

Well – the results of the most successful planned giving operations in the country reveal just the opposite – and analysis of the experiences of organizations which have gone down the high-tech-only path also makes for interesting reading. This group has found some undesirable consequences from their new electronic chumminess with their prospects:

- Prospects are sending the planned giving postings straight to their trash bin.
- Their e-mail systems are deleting the postings as spam.
- They are receiving exact-same, commercially generated e-mails from multiple charities.

The electronic messages these organizations are sending are bland, generic and boring, and so removed from the emotional and human link that binds the prospect to the charity that the prospect feels alienated from the appeal contained in the posting.

The Subtle Flavor of Spam

Just like you, your prospects wade through a pile of unsolicited e-mail. Communications from their favorite charities are buried among appeals from supermarkets, mortgage brokers, and credit-repair agencies. Your prospects budget just a limited amount of time every day to checking e-mail – what's the chance they will find your weekly planned giving newsletter among the chaff, and what's the even smaller chance that they will take the time to open your posting and read it?

Americans read their mail standing over the wastebasket, and we scan our e-mail with one finger on the Delete key.

Promotional material that is automatically mass-mailed to a list of email addresses sounds like spam, doesn't it? Especially when it's received with repetitive, mechanical frequency. You wouldn't respond to that approach, and neither would your prospects. They're more likely to reach for the Delete key and tune you out.

5% or less of planned and major gift totals. For the most successful fundraising operations among our respondents, a 91% of respondents recorded those 5%-or-less results.

Now, what has the real cost been to the planned giving office? Consider the time you have spent over the last year and a half getting up to speed on the Pension Protection Act; sitting through seminars and reading tax bulletins; and then trying to translate all that complicated information into persuasive marketing pieces for your prospects. If your organization has received substantial IRA distributions as a result of those efforts, congratulations!

But even if you have been successful, remember that the time you spent *learning* about IRAs was time you weren't doing your most important job – *being face-to-face with prospects*; that the IRA distributions you've received could/should be classified as major and not planned gifts; that they were made by donors who probably could have afforded to make a gift in the same amount or larger from other assets – and that, by stripping their retirement account, the donors have reduced their ability to make a significant estate gift that, without question, the planned giving office could have counted and promoted to its prospects.

Bottom line? The IRA Rollover has encouraged prospects to look at non-traditional assets as sources for charitable gifts. It has delivered immediate cash instead of requiring the nonprofit to wait for its gift until the death of the donor.

But let's do a reality check: your bread and butter is still bequests and gift annuities!

And it's not just us curmudgeons saying it: over 50 percent of respondents to our survey told us that they did not expect outright-IRA-rollovers to significantly affect their fundraising totals.

Comments?
editor@plannedgiving.com

Dressing pseudo-spam up in a suit and tie and calling it a newsletter doesn't fool anyone. Prospects aren't dumb. Your most powerful argument in favor of their giving engages their mind with persuasive content. The mind of our donors is the marketing battleground.

Look at the content provided for most commercially produced e-newsletters.

Most often it consists primarily of generic gift-planning and investment advice. That comes as no surprise – canned information has to be "cookie-cutter" generic so it can be plugged in for distribution to multiple organizations. Regardless of how much information you think you are providing, on the receiving end your prospects will notice that it's being duplicated by other organizations, is dry and uninteresting, and seems unrelated to your charitable mission. Result? You may lose their attention. *Forever*.

Whose Specialty Is This Anyway?

Here's another point to consider: The big boys in the finance industry do investment advice better than anybody else. So when you send canned investment advice to your prospects, you're competing with the mega-financial institutions on their home turf. In addition, prospects also have access to investment and estate-planning advice from sources like *The Wall Street Journal*, *Forbes*, and the 24-hour business channels. Why waste your marketing resources trying to get your voice heard among that crowd?

(Famous anecdote: Prospect receives a canned financial-planning letter from the Zoo. Turns to his wife and says, "The day I listen to the Zoo about how to restructure our portfolio, I'll send our broker there to feed the elephants.")

When Do You Reach Overkill?

Relying on the form your marketing takes instead of on the message it delivers is the first step in turning your prospects away. Too much can be a bad thing, especially impersonal or intrusive contacts that communicate nothing of value about why your organization is in business. Your prospects will quickly reach the point of groaning, "Oh no, not her again," when you bombard them with e-mails.

Mission-driven vs. Profit-driven

Of course you should use Websites, e-mails, and a creative blend of print pieces in your marketing. But as you deploy them, remember that you are building upon a special relationship with your prospects. They believe in the work of your organization, they are grateful for and proud of their association with you, and they want you to be able to keep on doing good work far into the future. Talk to them about that – it's what we mean by the human con-

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FACTOIDS

New Technology, Same Old People

- US Mail, not e-blasts, is still the way prospects prefer to receive information.
- 73% prefer mail, 18% prefer the same content by e-mail.
- For "Confidential Information" it's 10% (unchanged from 2004)
- 70% prefer US mail from companies they are not doing business with.
- For e-mail, the preference is less than 10%. This makes "new customer" acquisition via e-mail blasts tough.
- If you take deliverability issues into account, you have a 9.4% *chance* your email *may* be read. [The real chance it *will* be read is probably less than 1%.]

Why Most Planned Giving Marketing Fails

Ever wonder why your traditional efforts to market planned gifts are producing less and less response? Or why you're working twice as hard nowadays to get the same or declining results?

It's probably because you're counting on the same old marketing techniques that have been around since planned giving was still "news".

Well, your prospects know how planned gifts work by now, and as they wade through clogged mailboxes, both real and virtual, they are tuning out your stale, dry communications.

Our next issue will show why traditional planned giving direct mail, such as newsletters and brochures, simply does not get read. Think "high-tech" is the answer? E-marketing can send your prospects duds, too. (See last issue, page 6, at **PGtomorrow.com**)

We'll also show you tools you can use to succeed.

How Productive Are You?

A recent study found that Fortune 500 CEOs on average have 28 productive *minutes* a day.

What's *your* number? Between meetings, paperwork, dealing with vendors, emptying the trash...

It's time to pick up a good book on time management and begin thinking proactively about productivity.

But my prospects are smarter than everyone else! *Viken Mikaelian*

Whether you're Yale, the local Diocese or the SPCA around the corner, your "talk" should be simple, direct and concise; preferably written in 10th grade English. Make that 9th grade.

"But my prospects are smarter..."

They may be, but the average attention span is not geared for reading anything that requires effort. So if you're writing copy for your next solicitation, brochure or newsletter, here are some pointers:

1) Read your copy aloud. If you find tongue twisters or hang-ups, fix them. The letter should read easily and flow smoothly from one thought to the next whether read silently or aloud.

2) Read the copy to "typical prospects". This could be an acid test. Better yet, create a bond with a donor by asking for help and advice. You'll be delighted with the results. Be certain to thank them with a small gift.

3) Have a young child read your copy aloud. Any phrases the youngster has difficulty with should probably be changed.

4) Don't fall for the "sophistication trap". One out of three American adults lack the skill level required to be considered satisfactorily literate.

"But my prospects are definitely smarter than everyone else!"

A colleague at a leading law school recently informed me that one of his prospects, a well-educated attorney, mentioned how complicated these gift plans were and asked whether he could explain it over dinner at her house.

No matter who the recipient of your copy might be, it is better to err on the side of simplicity. As H.L. Mencken said, "No one ever went broke under-estimating the intelligence of the American public." In fact, many have gone broke overestimating the sophistication of their customers. If you are stubborn about this, you'll go broke too.

Write for Passion. Edit for Clarity.

Solicitation letter writing is no place for cold, hard, logic. Most people, even logical people, make important decisions based on emotion, not logic... an important fact the advertising industry uses to its advantage.

People buy on emotion and then justify their choice with logic. I learned this the hard way trying to prove to prospects how great our products were compared to our competitors' and losing sales to slick, emotional salesmanship. You can't provoke emotion with

How To Make Prospects Tune Out Without Trying
Continued from previous page

tact. How can your marketing harness the power of this unique relationship? With mission-driven messages.

For fundraising professionals, understanding this distinction is crucial, and it reveals the fundamental flaw in automated, *remote-control* marketing.

Profit-driven Marketing

- Puts you at a disadvantage. It reduces your message to generic gift or investment advice or canned profiles of models posing as "donors", and
- Limits your message to "Our planned gifts are as good as everybody else's!"

Mission-driven marketing

- Empowers your organization to build upon its unique relationship with prospects, and
- Personalizes your message.

For example, "Your special legacy to our institution enables us to further the goals that we support together, far into the future. You can make a difference in the lives of those that we serve."

Which works better? Which one grabs the attention and emotions of your prospects?

Profit-driven marketing is weakened because it is mechanical, impersonal, and generic. It dilutes quality with quantity in the name of convenience, and drives prospects to tune out.

Mission-driven marketing, on the other hand, trumps quantity with a unique, compelling, organization-specific message. It engages prospects on a personal level. Prospects see that electronic and print materials are genuine communications from their favored institution, so their minds will open to receive the message – about how their legacy can make a difference.

That's how you avoid marketing overkill! That's how you prevent your prospects from tuning you out. And that's how you build on relationships and achieve real success for your organization through its planned giving program.

a pie chart and a spread sheet. Just look at juries these days. "If the glove doesn't fit ..."

Consider this: regardless of the fact that planned giving newsletters do not get read, fundraisers still continue using them. They either have an intimate relationship with their sales person or are emotionally tied to the idea. Logic would prove otherwise.

That's the reason you don't find many hard-core analytical personalities in sales. Most successful salespeople – even in highly technical fields – have amiable, friendly, enthusiastic personalities. They are "people" people.

Your sales letter should reflect the same attitude, especially in the area of planned giving.

"Cold fish" solicitation letters rarely work. The purely logical, factual approach fails almost every time. An effective sales letter needs to be doubly enthusiastic and expressive because it is ink on paper, not warm flesh and blood. Since the prospect cannot read your enthusiasm in person, it must be conveyed in print. What may seem overly expressive when you write will most likely wind up understated when it's read.

So, no matter what you think about your prospect's attention span or sophistication level, the number one sin is being boring. The desirable opposite is being exciting, passionate, a little wild; maybe bold and daring; perhaps even shocking; or you can make your descriptions poetic, romantic and colorful. Let your creative juices flow and your personality shine through.

Aggressive Editing

Aggressive editing means cutting out every word or phrase that fails to advance, strengthen, or reinforce your message. You are not editing to shorten. You are editing to clarify, and that will in itself shorten your document.

Learn from "street smart" pros...

Some of the most talented and best-paid copy-writers are those who develop copy-intensive direct response ads for the *National Enquirer,* earning fees of $25,000 to $100,000 per ad. To command that kind of money, you have to be good at drawing a response... the results have to be outstanding. So if you want to learn about effective copywriting tactics, pick up a copy of the *National Enquirer*; skip the articles about invading Martians impregnating local fundraisers and just study the ads.

... Did we say 9th grade English? Make that 8th ...

Comments?
editor@plannedgiving.com

Barriers to Creating a Donor-Centered, Gift Planning Marketing Effort *From page 1*

Barrier #1: Marketing Exclusively to Old People

A large number of programs market only to those 60 and up. The fact is that once donors reach 60, their likelihood to add your charity to their estate plans drops to 11% or less. To maximize the number of estate intentions and deferred gifts, you need to market to donors ages 30-60, when they are considering their estate plans.

Selecting your audience is critical in marketing. Instead of age, select your audience based upon their engagement with your charity. The best measure for most charities is consistent giving. If a donor has given over 10 or more years, the donor should be on your radar. This does not mean you shouldn't pursue people over 60, it simply means that you should select your target audience based upon their level of engagement, *then* send these engaged individuals age appropriate information to meet their needs.

Barrier #2: Marketing Gift Vehicles and Tax Benefits

For years gift planning programs have been sending out newsletters that tout tax-free income and other tax benefits of gift plans. Perhaps somewhere in the mailer there is information about the remainder to support the charity. The majority of our donors today are interested in results and impact. They believe in your mission and want to support it. The gift vehicles and tax benefits are only tools used to help donors support your charity in a meaningful way while also meeting a personal planning objective.

Instead of tax oriented pieces, create materials that focus on donors' needs: Increasing Retirement Income; Providing Income to Elderly Parents; Paying for College for Children or Grandchildren; Maximizing Children or Grandchildren's Inheritance; Crafting a Legacy; Unlocking Value in Existing Assets; Using Real Estate Creatively; and Creating a Family Vision and Multi-Generational Plan. Each of these titles speaks to planning objectives of the donor. When you combine this donor-centered approach with materials about your mission and the impact giving has now and in the future, your levels of support will increase. The gift

Continued on back cover

Technical Skills vs. People Skills

Did you know most companies base 80% of hiring decisions on technical skills, yet 85% of turnover is due to behavioral incompatibility?

We're so hung up on fulfilling technical requirements that we often forget we're dealing with people and fail to analyze the necessary people skills required.

People skills are by far the most valuable to your success. You can always hire a professional to assist you with technical details when it comes to planned giving. If you are gifted with both (which is rare), may the Force be with you.

Always remember: People give to people, not to institutions. So instead of taking the next course on gift annuities or the IRA Rollover, pick up a copy of *How to Win Friends and Influence People* by Dale Carnegie… an $8 investment that has made millions for many.

"Stop Promoting Death!"

This article is not for the faint of heart or the fawningly polite. Read our notorious editorial at: **plannedgiving.com/4655**

"You Had Me at Bequest!"
Continued from front cover

walls of fame, etched onto a plaque or mug, and whisked away into a legacy giving society.

Then, drops off the crevice into the deep, dark hole of *no further action* required.

Let's instead become *Masters of the Revocable* and review our current practices to find more creative ways to maintain relationships.

Several years ago, while attending a Mid-American Development Conference, I was intrigued by a panel of donors discussing their pet peeves of fund raising.

One older donor stunned the audience as she recounted how her multi-million dollar bequest went largely ignored.

"I was virtually forgotten... tucked away in someone's file," she explained, "I wasn't on anyone's invitation list, never received a call, never even got a simple birthday card. In short, when I updated my Trust, I took them out. They probably still don't realize, but when I pass, they'll discover what I did, and it will be far too late for anyone to make amends."

Aha...payback, and rightly so.

Here was a donor who simply wished to be remembered and engaged on an ongoing basis. Not tucked away and tossed into a drawer...

Another hazard of the road to a planned gift expectancy, is improper or insufficient stewardship where the donor learns that her estate gift will either not be used as intended or has not received the good housekeeping seal of approval from the benefiting programs. What else can a revocable planned gift donor do, but revoke the gift and find another organization more befitting of its intended charity?

For this reason, including all individuals at the organization in the gift acknowledgment is essential. Crafting appropriate gift agreements that substantiate the gift and how it will be utilized is simply good practice.

As development professionals, we prioritize our pool of prospects and maximize the activity spent to ask for and secure gifts. As planned giving officers, we must also build in the appropriate process to provide ongoing cultivation of our revocable planned gift donors.

For small shops, this focus can be easily done by instituting new policies to replace outmoded ones; for larger programs, a team can be put into place to "do the thank" and do it well.

Here are the axioms of Best Behavior for Bequests:

- A revocable gift is just that... revocable. It comes with its own caveat emptor: I have given, yet I can take away...never forget!
- Every planned giving donor belongs in the current donor file, if only to be "touched" as frequently as donors of gift annuities, or outright gifts.
- Donors of bequests don't get annual updates on their endowment performance or how you have utilized their gift; create a way to communicate with them on a regular basis providing good information, and another expression of appreciation.
- Donors of bequests are excellent prospects for other gifts, especially current and annual. As you keep them engaged and looking forward to how their legacy will be preserved, they may become interested in experiencing donor satisfaction during their lifetime as well.
- Holiday greetings are a must, as would be special birthdays or other landmark occasions – however why stop with a greeting? Invite them to join advisory groups, special committees, or accompany you on calls to other planned giving prospects as any other major benefactor of your organization.
- In every communication, be sure to include the legacy society as the firm foundation of the future, and acknowledge the importance and generosity of the donors who have made the ultimate gift.
- Market the bequest as a way for everyone to participate in your charity's future, and equip all your front-line fund-raisers with information and access to your expertise; coach them on how to listen for verbal cues that invite a planned giving conversation, even inquiry.
- Provide a physical and constant reminder of your organization that is heart-felt.
- Every donor who is engaged with your organization should ultimately be approached for a bequest.
- Don't think of a planned gift as the donor's last gift ... think of it as the beginning of their relationship with your institution, the kind that includes discussion of their lifetime goals and assets.

A final thought: an intention to leave a legacy is confirmation of the donor's passion. Treat every intention as a promise... for you to keep the donor upfront, and the passion ongoing.

Mindy is the Associate Director at the Center for Gift and Estate Planning at Kent State University. She can be reached at: maleman@kent.edu

ETHICS CORNER

The One I Wished Had Gotten Away

Deborah Blackmore Abrams

I remember the face at the doorway to my office. "Congratulations on the huge gift annuity!" Sitting there, I could recall no gift, only the recent draft of a contract accompanied by calculations sent to a major gifts colleague for delivery to the widow and her advisors.

"Hey, thanks, but I'm not sure to what gift annuity you are referring." A check, in the amount of one million dollars was placed under my nose. And from there it went downhill.

It turns out that a volunteer solicitor for the school, and former classmate of the woman's late husband, had advised her that giving cash was in her best interest because capital gain rates were expected to rise from 20% to 27%. "Better to sell the stock and give the proceeds before the rates go up," she was told.

And now the gift was complete and irrevocable.

Do we tell her that she was given incomplete information that resulted in a direct loss of benefits to her? Do we let her know her late husband's friend was not a specialist in tax law – that his competency was in real estate?

She had made this gift believing that our volunteer, a lawyer, had given her good advice. Yet, her gift (and its income) could have been a full 20% larger, her charitable tax deduction significantly higher.

Ethical dilemmas have lots of opportunities to flourish in organizations whose policies and procedures are unclear – or undeveloped. In this instance a well-meaning, but zealous, development officer had prepared contracts for counter-signature without checking in with the planned giving colleagues who could have flagged the sale of stock. A competitive volunteer, propelled by the credit his reunion class would receive for this gift, failed to double-check his information – and failed to understand how she might interpret his "information" for advice.

To disclose – or not to disclose?

An appeal for guidance to the school's general counsel said no disclosure was necessary as long as we had included the appropriate disclaimer to "check with your own advisors." We had. So, why does it still feel that while we did what was legally appropriate we failed to do what was right?

Deb is a fund raising consultant in Dedham, Massachusetts. Her firm, Abrams Associates, specializes in planned giving programs, strategic planning, major gift programs and executive search.

"Quotable Quotes"

In the future there will be two types of non-profits: extinct and endowed.

– Source unknown

Planned Giving is Not an Important Component of Fundraising *Continued From Cover*

"Your Survey made me think, reflect and laugh! Good job!"

"...Entertaining, and the random 'fun' questions made it fun."

"...very creative..."

"You [VirtualGiving] seem to be the kind of company that would be fun to work with/for."

- For 15% of you, fundraising was your **first job**.
- Over 44% of you **donate** 2–5% of your income to charity.
- Over 21% of gift-planners earn **$106K or more per year.**
- 18% **visit 101+** prospects a year, and they are the top earners.
- Over 49% have **not counted IRA rollovers** as planned gifts.
- 82% report **less than 5%** of their gifts from the Rollover.

More facts, figures, responses, plus confessions and ruminations at: virtualgiving.com/surveyresults

Unusual Gifts. Unusual Stories. We want to know.

Have a war story to share? An unusual situation your peers could benefit from? A gift that went sour? A lesson learned? How about a warm and fuzzy anecdote about a relationship that turned into a life-long friendship? **Email us: editor@plannedgiving.com**. We'll publish it with your name attached, *or anonymously if you wish*. But please, do it now!

Best & Worst Months to Mail

When it comes to recipients' response to direct mail, it turns out that all months are not created equal.

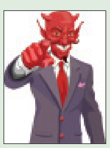
Mail volume, everyday distractions and holidays rise and fall seasonally.

A survey conducted by the Direct Mail Association suggests that your publication will have the best chance of getting read if it is received in February through May, and in September.

So-so months are January, August, October and November.

The worst?

Not surprisingly, June and July, typically crowded with vacations and family functions for most of us.



Dead Wrong Marketing: THE 13 SINS

Sin No. 1: We're telling the prospect we can't wait for him to die.

Sin No. 8: We're targeting the wrong prospects.

All 13 Sins, and how to save your program from them, were recently detailed in a lively presentation at the National Conference on Planned Giving in Dallas, TX. If your local fundraising group would enjoy a live, personal presentation as well, visit:

"Intense, interesting, practical, passionate, compelling."

virtualgiving.com/seminars or call 800-490-7090.

Presentations, Winter/Spring 2008:

St. Paul, MN
Phoenix, AR
Princeton, NJ
Rochester, NY
Asheville, NC
San Francisco, CA
Santa Fe, NM

UN-SENSE-ORED

Prospect to fundraiser: "You want me to visit you in the foundation? Is that ground level or basement?" ... "What is a bequest?" ... "I thought only my children could get my will" ... *

*Advice: don't expect your prospect to speak your language.

Barriers to Creating a Donor-Centered, Gift Planning Marketing Effort *From page 5*

vehicles and their tax advantages become tools used to create outcomes, *while your mission takes center stage.*

Barrier #3: Random Acts of Marketing

Your success depends on a comprehensive marketing plan carried out over many years. Preliminary data from the *2007 Gift Planner Profile* from the National Committee on Planned Giving indicates that only 25% of gift planners focus on gift planning full time. For the vast majority, gift planning marketing is just one of many other development responsibilities. Due to these time constraints, many charities commit "random acts of marketing." They realize that they have not sent out a mailing on gift annuities in a while and drop everything to get one out. Six months or a year later, they send another email or marketing piece on bequests. If there is a staff change, two or three years can pass between mailings. Unfortunately, the inconsistency of this effort (as well as it being gift vehicle based rather than donor-centered) leads to low response rates and a conclusion that their marketing plan is not working.

Your gift planning marketing effort warrants a written plan. Base it upon the steps of the moves-management process – identification, education, cultivation, solicitation and stewardship. By assigning each marketing step to the moves-management process, you ensure that your marketing plan will identify the right audience, provide educational materials to them over time, move them through cultivation to solicitation, and lastly help to steward them for the next gift. For a more detailed outline on how to create a written plan, visit: giftplanningdevelopment.com.

Conclusion

Donor-centered gift planning is not more work; it's simply a change in your approach. If you plan based upon a moves-management framework, select the right audience and send them messages focused on their goals and objectives, you will get a better response. More importantly, you'll have donors who are more engaged in your mission, more excited about the outcomes they can achieve, and more likely to spread the word to others, thereby creating even more gifts for your charity.

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